

Purpose: To provide instructions on scheduling a BC Virtual Visit appointment.

NOTE: BC Virtual Visit enables the connection between clients and providers; it does not replace your existing scheduling solution. It is important to ensure that you document any missed or “left without being seen (LWBS)” appointments in your existing EMR or scheduling solution to ensure accuracy.

Capturing a Client’s Email and Consent

When offering a virtual visit, clients should be informed by any member of the health care team prior to the visit about the benefits and limitations of virtual care and how to prepare for the visit. A client’s verbal agreement to the use of technology must be obtained to proceed with a virtual visit and be confirmed by the health care provider at the time of the visit. **The client’s voluntary, informed acceptance or refusal to attend a virtual care appointment is to be documented in the client’s Health Record.** If the virtual appointment will include a treatment or procedure, informed consent must be obtained by the client as per Island Health’s [Consent to Health Care and Advance Health Care Planning](#) policy.

Email addresses and consent are collected to support the delivery of client care, to communicate information about the client’s health and care, and to keep the client informed about Island Health’s care and services.

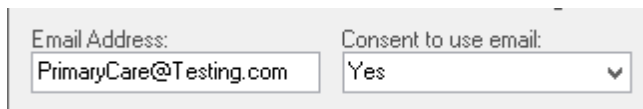
When capturing consent, it is important to ask your clients to review the [Electronic Communication/Virtual Health - Information for Patients to Consider](#) document outlining potential risks associated with electronic communication. You can provide your client a copy or refer them to review the document on the [BC Virtual Visit webpage](#).

At this time consent can be captured in one of two ways: when registration/scheduling the encounter in Cerner or verbally and then charting consent in the appropriate location.

1. For Programs That Register in Cerner using PMOffice:

At the point of registration or scheduling when an encounter is created or updated in Cerner (In PM Office under the **Addresses Tab**) consent can be captured by:

- a. Typing the email address provided by the client in the email address field.
 - i. Confirm you have recorded the correct email address with the client by stating it back.
- b. In the consent to use email field, Select Yes from the drop down if the patient consents, see example below.



Email Address:	Consent to use email:
PrimaryCare@Testing.com	Yes

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Capturing client email and consent in PMOffice supports integration between Cerner and BC Virtual Visit. Collection of patient email and Consent = 'Yes' in Cerner allows new client profiles to be created and existing profiles to be updated automatically in BC Virtual Visit.

2. For Programs That Do Not Register in Cerner:

Verbal consent can be captured as part of the clients record as per standard charting process (such as Cerner, Paper, Authorization for Electronic Communications Form)

Confirming Client Email and Available Devices

Prior to scheduling a BC Virtual Visit appointment, it is important to confirm the following:

1. Client Email Address
 - a. We know a client's email address may change at any point. It is important to confirm the clients email address is still correct each time a BC Virtual Visit appointment notification is sent at scheduling. Verifying and updating the patient's email address as part of the scheduling process will ensure that the appointment email notification reaches the intended participant. If you need to update the client's email please see the instructions below.
2. Client's comfort level with technology or using a web based virtual application, and access to a suitable device. Key things to review when scheduling include:

<input type="checkbox"/>	Does the client have an active email address that they use regularly?
<input type="checkbox"/>	Does the client have access to a device they can use for BC Virtual Visit appointments?
<input type="checkbox"/>	Does the client plan to use an iPhone or iPad for their BC Virtual Visit Appointment?
<input type="checkbox"/>	Is the client comfortable downloading the BC Virtual Visit application from the app store, if they do not have it already installed?
<input type="checkbox"/>	Does their device have a built-in microphone and camera? (e.g. client has used Skype or FaceTime)
<input type="checkbox"/>	Does the client device have Google Chrome, Firefox, Edge or Safari?
<input type="checkbox"/>	Does the client have a reliable Internet connection in the space they will be having their appointment?

IMPORTANT: If this is the client's first virtual appointment, recommend they prepare for the visit *ahead of time*, by reviewing the **Tips for a Successful Appointment** on the [BC Virtual Visit Webpage](#), or by calling the **Patient Virtual Healthcare Tech Support Desk at 1-844-442-4433** (Monday to Friday 7 am - 5pm, excluding statutory holidays) to complete a test call.

For first time users it is helpful to determine what kind of device your client has and provide a little guidance in advance (details are available to them on the website so that they can do this in advance of the appointment):

Apple iPhone or iPad	<p>Download the BC Virtual Visit Application on their iPhone or iPad.</p> <ol style="list-style-type: none"> a. Encourage the Client to do so in advance of their visit. b. Detailed instructions can be found on the Island Health website at: islandhealth.ca/BC Virtual Visit
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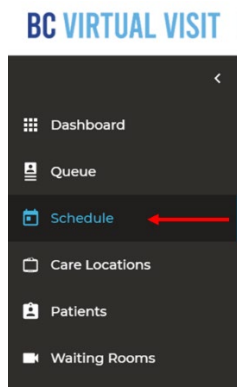
<p>Mac Computer or Desktop</p>	<p>Download the Teladoc Health Desktop Application.</p> <ul style="list-style-type: none"> a. Encourage the Client to do so in advance of their visit. b. Detailed instructions can be found on the Island Health website at: islandhealth.ca/BC Virtual Visit c. Clients may also join via the Chrome, Firefox or Safari browsers if they are uncomfortable with downloading the Desktop application.
<p>Windows PC or Laptop</p>	<p>Download the Teladoc Health Desktop Application.</p> <ul style="list-style-type: none"> a. Encourage the Client to do so in advance of their visit. b. Detailed instructions can be found on the Island Health website at: islandhealth.ca/BC Virtual Visit c. Clients may also join via the Chrome and Firefox browsers if they are uncomfortable with downloading the Desktop application

Scheduling a BC Virtual Visit Appointment

NOTE: The BC Virtual Visit appointment link your client receives contains a unique link just for them. They should NOT forward their invitation to others as only one person may join using this link. If an additional participant tries to join using the same link, their audio and video will be blocked.

If the client needs a family member or support to attend their visit from a different location, the healthcare provider can invite them from within the video visit or ahead of time by using an email template and the waiting room link. For more information on scheduling guests, please review the [quick reference guide](#).

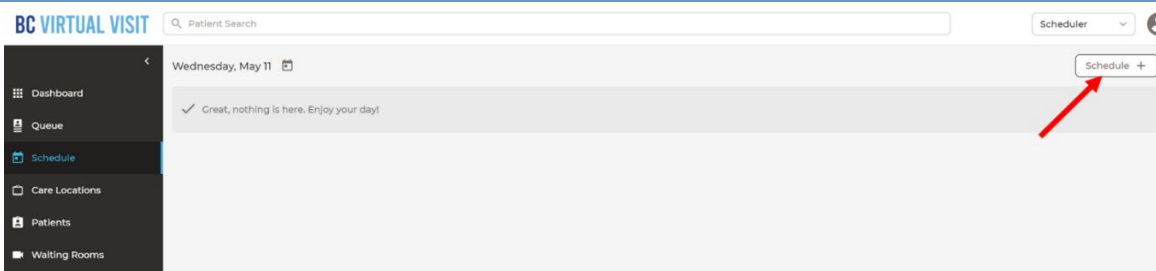
1. In the left navigation bar, select **Schedule**.



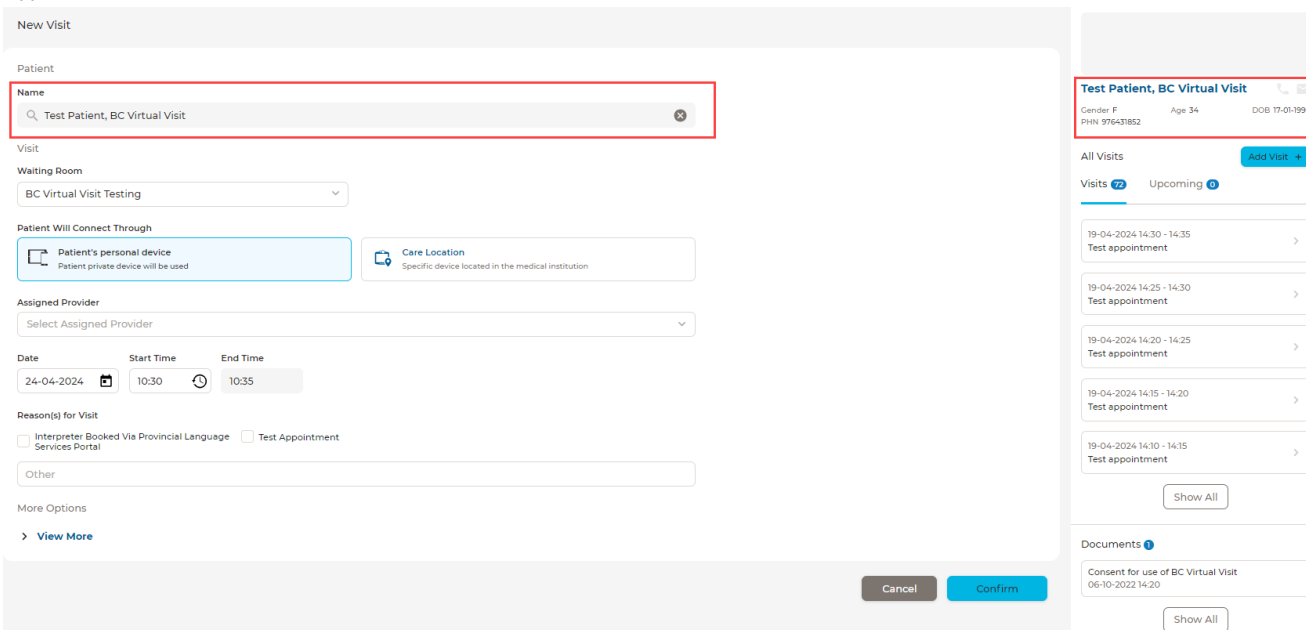
2. Click **Schedule +** in the top right corner.

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3. Type the client’s name into the *Name* field and select the client from the list.



3.1. Confirm the correct client has been selected by reviewing **DOB** and **PHN** (i.e. 2 identifiers).

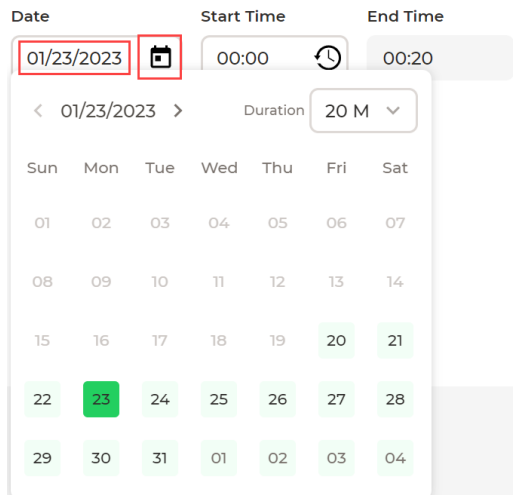
4. Select the **Waiting Room** you’d like to schedule the visit for.
5. Add an **Assigned Provider** to the visit if desired. Only one provider can be added and they must be a member of the current waiting room. *Whether a provider is added to a visit has no impact on whether they (or other waiting room members) can join the visit with the patient.* By tagging a provider to a visit, they will receive notifications if enabled in their settings and you have added flexibility to filter by the provider’s name in the Queue.



Recommended workflow for visits with multiple providers: Add the primary provider to the **Assigned Provider** field and continue using the Reason for Visit field to identify other providers joining the visit (where your clinic is already using custom Reason for Visit values).

6. Select the desired date, time, and duration for the appointment
 - 6.1. Select a date by clicking the calendar icon and clicking on the desired date of the appointment. Alternatively, you may edit the date directly by typing the date in mm/dd/yyyy format directly in the date field.

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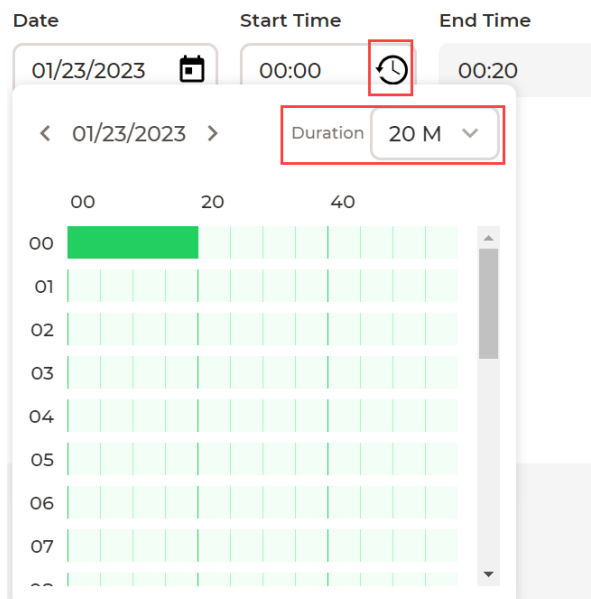




Date: 01/23/2023  Start Time: 00:00  End Time: 00:20

< 01/23/2023 > Duration: 20 M ▾

Sun	Mon	Tue	Wed	Thu	Fri	Sat
01	02	03	04	05	06	07
08	09	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	01	02	03	04

- 6.2. Select the desired appointment **duration** by clicking the clock icon, then selecting a duration using the dropdown.



Date: 01/23/2023  Start Time: 00:00  End Time: 00:20

< 01/23/2023 > Duration: 20 M ▾

00 20 40

00	20	40
01		
02		
03		
04		
05		
06		
07		
08		

- 6.3. To set a start time for the appointment, you may type a time in 24-hour format directly in the start time field. **Note:** the time must be a multiple of 5 minutes. The End Time field will autofill based on the duration selected.

- Alternatively, you may use the time picker to set a start time: click the time when you want the appointment to start. The green bar will adjust to your selection (as shown in the image above).

7. Identify any secondary healthcare providers joining the visit as per the custom *Reason(s) for Visit* values created for your clinic (where applicable). For example:

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Reason(s) for Visit

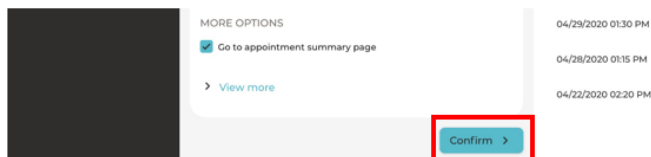
3 Month Visit 6 Month Visit 12 Month Visit

18 Month Visit Physician RN/CNL

SW PT/OT Research Assistant

Other

8. Click **Confirm** at the bottom of the page to send an email and/or mobile phone invitation to your client.



9. You will now see the appointment summary page, indicating you have successfully scheduled this appointment.

Appointment

BC Virtual Visit Test Patient

Wednesday, 24 April 2024, 10:30 - 10:50

Scheduled

[Reschedule](#) or [Cancel](#) visit.

Assigned Provider
Generic Provider
[Edit](#)

Reason(s) for Visit
Test Appointment
[Edit](#)

Patient notifications

- At scheduling 24-04-2024 10:34
Email, SMS
- Notify patients when a provider joins the call
Email, SMS

Share

URL for the recipient

Email Invitation

SMS Invitation

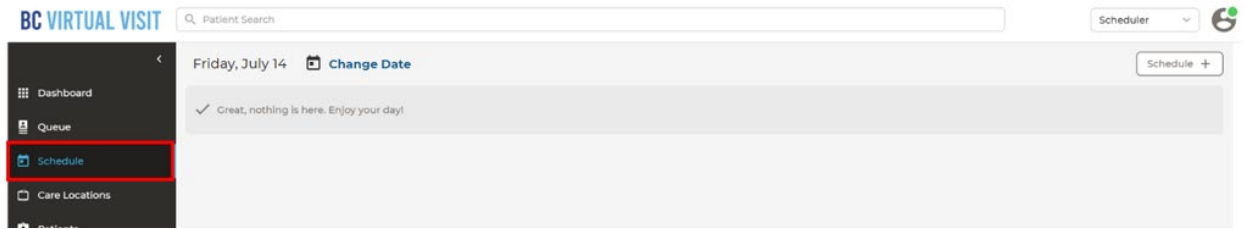
Rescheduling, Cancelling, Re-sending, and Adding or Modifying a Provider or Reason for Visit for a BC Virtual Visit Appointment

The following sections walks you through how to navigate to the appointment summary page where you will be able to reschedule, cancel, re-send an invitation, or modify a provider or reason(s) for visit for an existing **BC Virtual Visit** appointment.

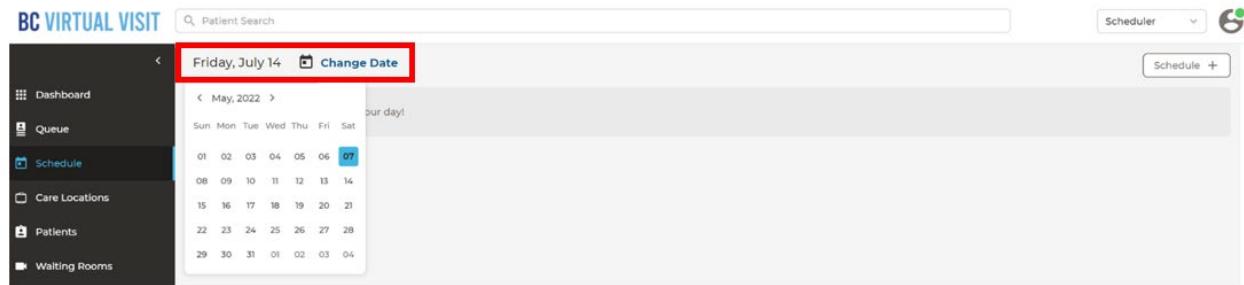
1. Select **Schedule** from the left navigation bar.

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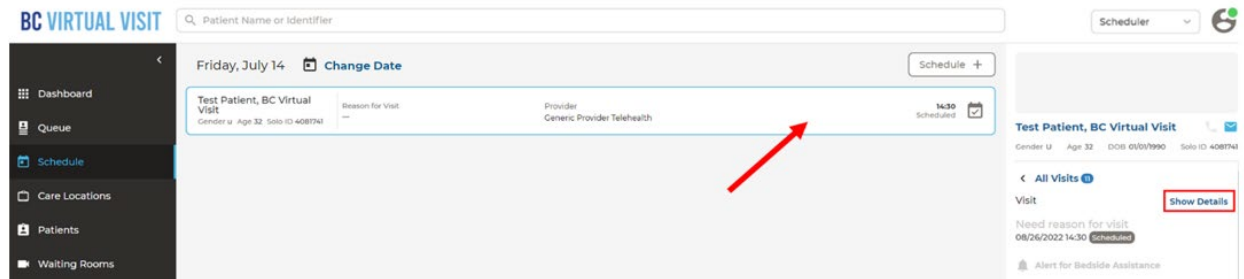
Technical Support: BC Service Desk and Clinical Service Desk x18777 or 250-370-8777 (Local Victoria) or 877-563-3152 (Toll Free)



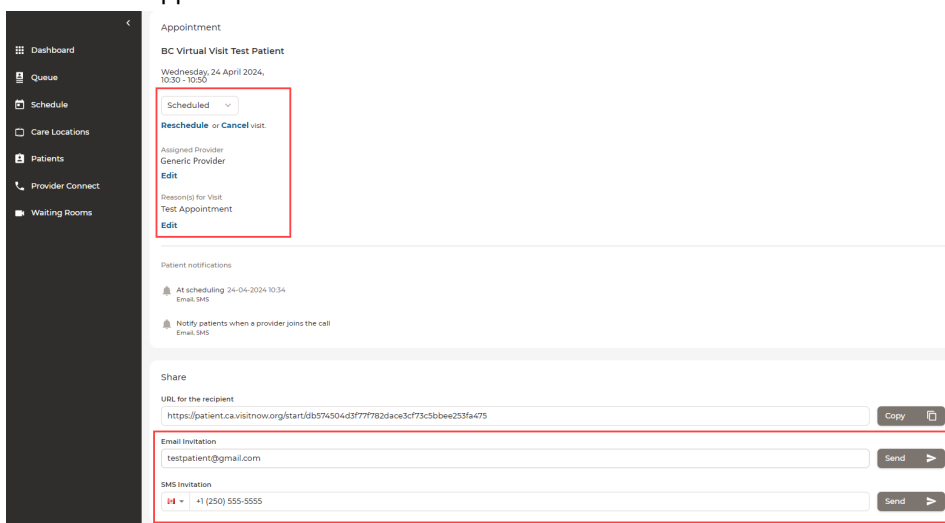
2. Select the date at the top, and use the date picker to select the date you wish to view.



- 3.
4. Select the appointment you wish to cancel, re-send or modify/add a reason for visit. Then click on **Show Details** on the right navigation bar.



5. You will now be taken to the appointment summary page as shown below, where you may choose to cancel, re-send, add/modify an assigned provider, or and/modify a reason(s) for visit for an existing BC Virtual Visit Appointment.



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Rescheduling a BC Virtual Visit Appointment

1. In the appointment summary page above, click **Reschedule**. A menu will appear allowing you to set a new date and time for the appointment.

Friday, August 04 2023,
12:30 - 12:45

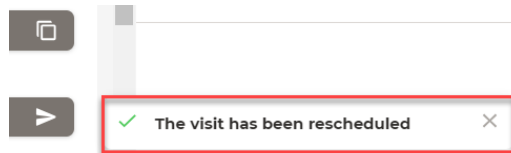
Scheduled ▾

Reschedule or **Cancel** visit.

Date	Start Time	End Time
08/04/2023 	12:30 	12:45

Confirm **Leave the Same**

2. Update the date and start time of the appointment then click **Confirm**. After confirming the rescheduled time, you will see a pop-up in the bottom right of your screen notifying you that the appointment has been rescheduled. The client will receive an email, SMS (text) message or both depending on the contact information listed in their profile.



Cancelling a BC Virtual Visit Appointment

1. In the appointment summary page above, click **Cancel**. A pop up will display, then click **Yes** to confirm. The client will receive an email, SMS (text) message or both depending on the contact information listed in their profile.


CANCEL APPOINTMENT

Do you want to cancel the appointment for BC Virtual Visit Test Patient on Friday, August 26 2022 14:30 ?


No **Yes** ✓

Re-Sending a BC Virtual Visit Appointment Invitation

This section is intended to provide instructions for re-sending an existing appointment invitation to your client in cases where they may have misplaced their invitation and would like to receive a new one. There are two different options:

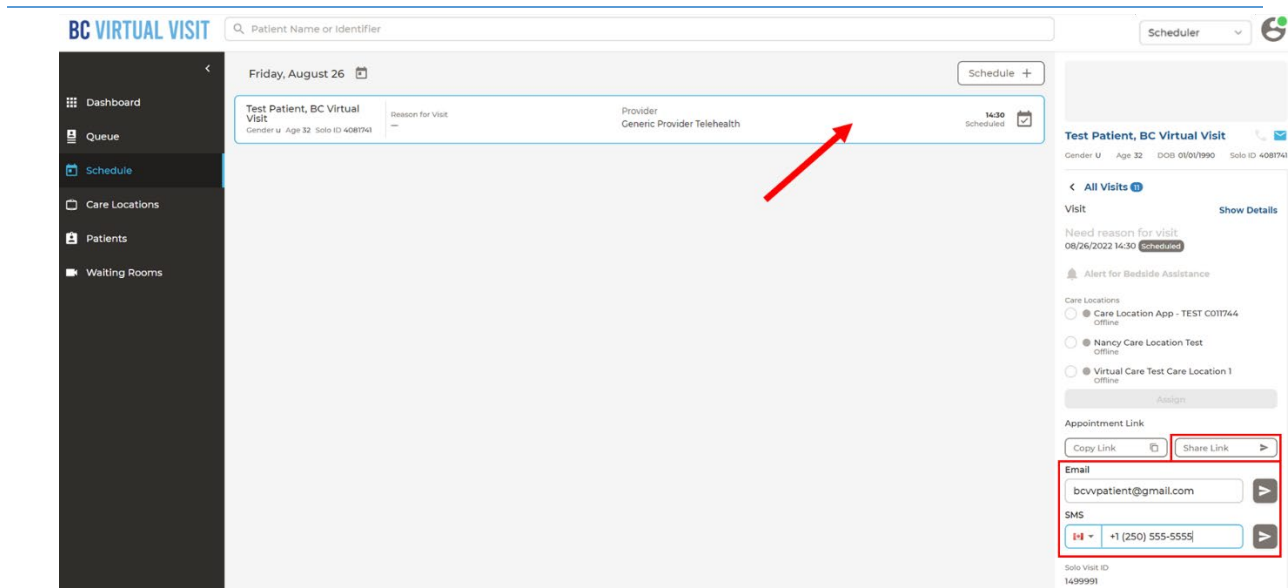
1. In the appointment summary page above, click on **Send**  next to the client's email and/or mobile phone number (SMS). By doing so, a new appointment invitation will be sent to your client.

OR,

2. For a selected scheduled visit, click **Share Link** and then select the send  button next to the patients email and/or mobile phone number (SMS) options.

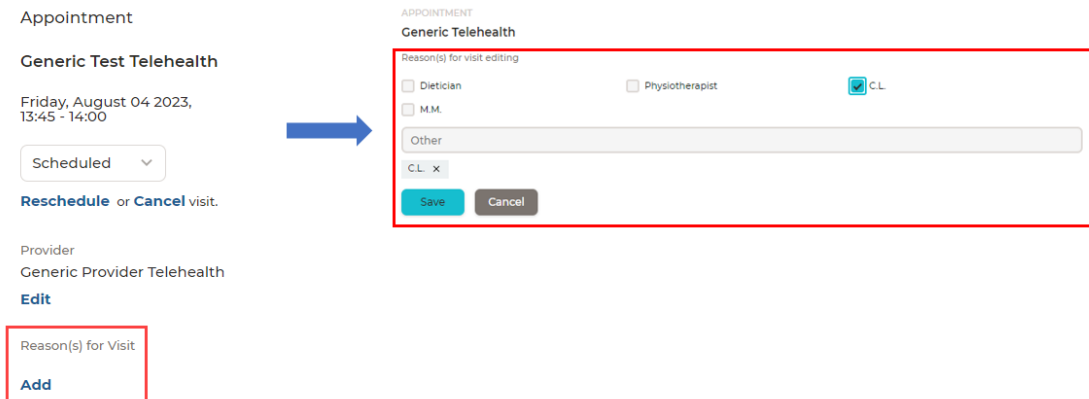
www.islandhealth.ca/bcvirtualvisit

Technical Support: BC Service Desk and Clinical Service Desk x18777 or 250-370-8777 (Local Victoria) or 877-563-3152 (Toll Free)



Adding or Modifying a Reason for Visit for an Existing BC Virtual Visit Appointment

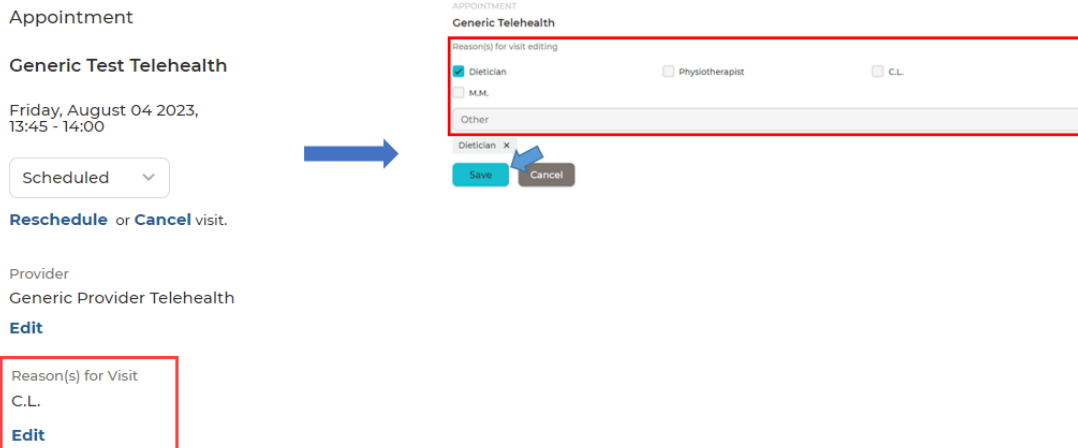
1. **Adding a Reason for Visit:** In the appointment summary page above, click on **Add** underneath Reason for Visit, and then choose one of the pre-determined options or enter free text. Once you have selected your reason for visit, click **Save**.



2. **Modifying a Reason for Visit:** If you had an existing Reason for Visit for your BC Virtual Visit appointment, you can modify it by following the same steps. Instead of an **Add** option, you will see an **Edit** option.

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Appointment
Generic Test Telehealth
 Friday, August 04 2023,
 13:45 - 14:00
 Scheduled ▼
 Reschedule or Cancel visit.

Provider
 Generic Provider Telehealth
 Edit

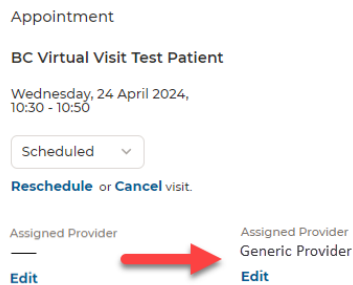
Reason(s) for Visit
 C.L.
 Edit

APPOINTMENT
Generic Telehealth
 Reason(s) for visit editing
 Dietician Physiotherapist C.L.
 M.M.
 Other
 Dietician x
 Save Cancel

Adding or Modifying an Assigned Provider for an Existing BC Virtual Visit Appointment

Note: As mentioned, assigning a provider to a scheduled visit does not prevent other healthcare providers from connecting to that same visit. Assigning a primary provider can improve front-end visibility, allow for improved Queue filtering, and provide additional notification flexibility (e.g. providers can choose to only receive notifications where they are assigned to the given visit).

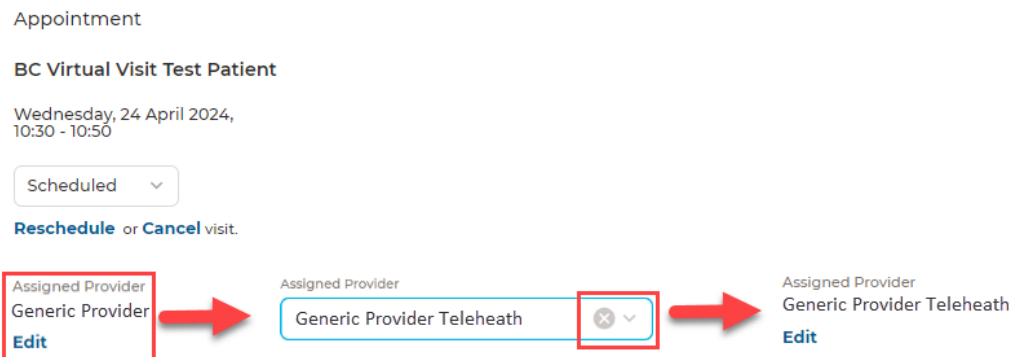
- Adding an Assigned Provider:** In the appointment summary page above, click on **Edit** underneath *Assigned Provider*, and then search for one of the providers that has access to the given waiting room. Select a primary provider for the visit to have it apply to the scheduled appointment.



Appointment
 BC Virtual Visit Test Patient
 Wednesday, 24 April 2024,
 10:30 - 10:50
 Scheduled ▼
 Reschedule or Cancel visit.

Assigned Provider → Assigned Provider
 Edit Generic Provider
 Edit

- Modifying an Assigned Provider:** You can change the primary provider that you have associated to a visit. Select **Edit** under the providers name and either begin typing the new providers name or select **X** and then search for the new provider. Once selected, they will now be associated to the scheduled visit.



Appointment
 BC Virtual Visit Test Patient
 Wednesday, 24 April 2024,
 10:30 - 10:50
 Scheduled ▼
 Reschedule or Cancel visit.

Assigned Provider → Assigned Provider
 Edit Generic Provider → Generic Provider Telehealth ⓧ → Assigned Provider
 Edit Edit Generic Provider Telehealth
 Edit

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Note: You can also add or edit an existing provider via the right-hand profile pane when a particular visit has been selected. This achieves the same result as editing the provider from the appointment summary page.

The screenshot shows the BC Virtual Visit interface. On the left, a patient appointment is listed with details: 'Test Patient, BC Virtual Vi...', Gender F, Age 34, DOB 17-01-1990, PHN 976431852, Reason for Visit: Test Appointment, Assigned Provider: Generic Provider, and time 10:30 - 10:50 on 24-04-2024. A red arrow points to the 'Assigned Provider' field. On the right, the 'Test Patient, BC Virtual Visit' profile pane is shown, with the 'Assigned Provider' field highlighted in a red box and an 'Edit' button next to it.

Updating a Client's Email and Phone Number in BC Virtual Visit

NOTE: A client's email should only be updated in BC Virtual Visit when consent is gained as per the first section of this document, "Capturing a Client's Email and Consent".

The clients email address and phone number(s) now flow from Cerner to BC Virtual Visit automatically when the client's record is touched in Cerner; however, the Primary Phone and Primary Email values on the BCVV profile will remain the source of truth. If the Primary values need to be updated in order for the client to receive appointment notifications, the fields will need to be edited in BC Virtual Visit.

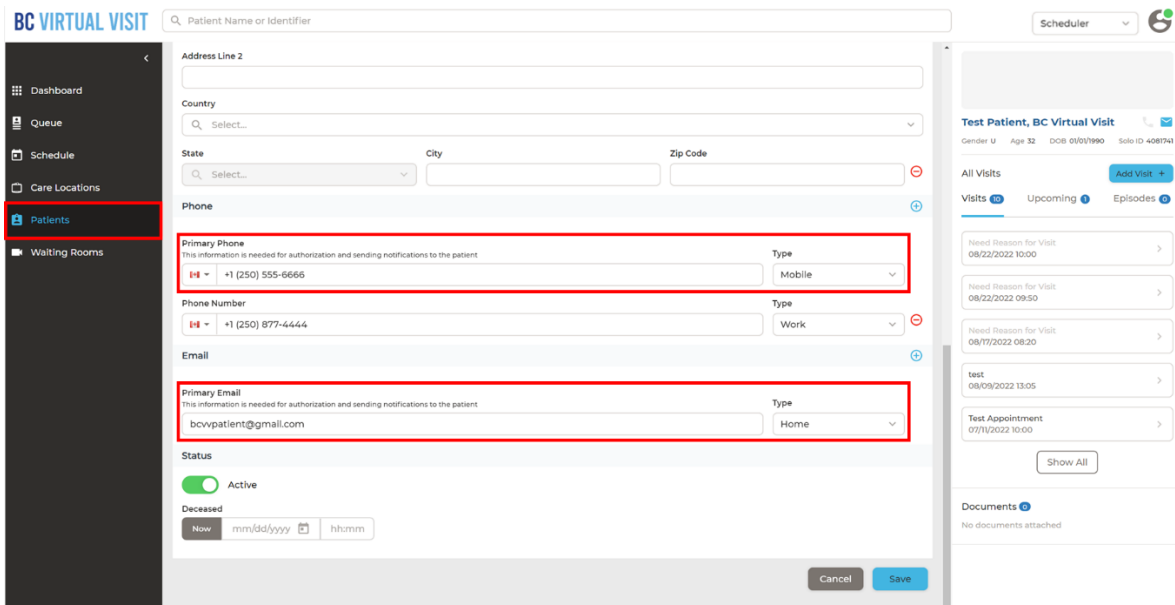
1. Search and select the client profile whose email or phone number you wish to update.
2. Click on the client's name on the right navigation panel.
 - The client's profile and demographic information will display in the center window.
3. Click the *pencil icon* located in the top-right corner of the center window.

The screenshot shows the BC Virtual Visit interface with a patient profile open. The profile pane on the right shows 'Test Patient, BC Virtual Visit' with personal information: Name: BC Virtual Visit Test Patient, Date of Birth: 01/01/1990. A red box highlights the pencil icon in the top-right corner of the profile pane, indicating where to click to edit the profile.

4. Update the email address(es) and phone number(s) as necessary. **Only the Primary Phone and Primary Email values will receive appointment notifications.** If you need to add new Primary Phone or Primary Email values while retaining the current values, use the to create new secondary fields for the current values. Once these values have been copied into the new secondary fields, add the new values to the Primary fields. Click **Save** at the bottom of the profile to capture any changes.

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BC VIRTUAL VISIT Patient Name or Identifier [Search] Scheduler [Dropdown]

Address Line 2 [Text Field]

Country [Select...]

State [Select...] City [Text Field] Zip Code [Text Field]

Phone

Primary Phone
This information is needed for authorization and sending notifications to the patient
+1 (250) 555-6666 Mobile

Phone Number
+1 (250) 877-4444 Work

Email

Primary Email
This information is needed for authorization and sending notifications to the patient
bcvpatient@gmail.com Home

Status
 Active
 Deceased
mm/dd/yyyy hh:mm

Cancel Save

Test Patient, BC Virtual Visit
Gender U Age 32 DOB 01/01/1990 Solo ID 4081741

All Visits [Add Visit +]

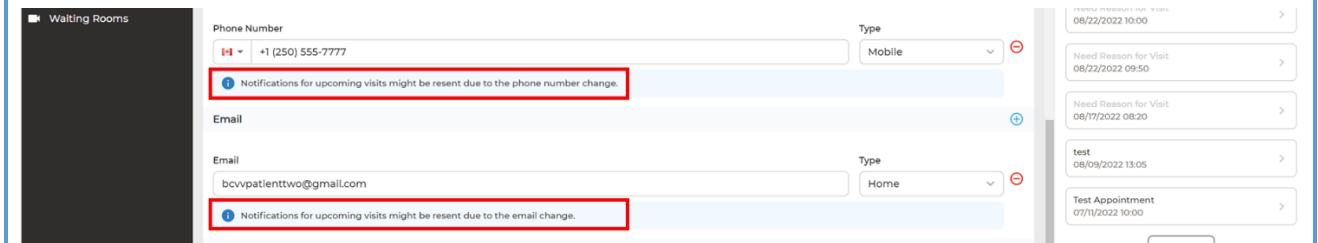
Visits [2] Upcoming [1] Episodes [0]

Need Reason for Visit 08/22/2022 10:00
Need Reason for Visit 08/22/2022 09:50
Need Reason for Visit 08/17/2022 08:20
test 08/09/2022 13:05
Test Appointment 07/11/2022 10:00

Show All

Documents [0]
No documents attached

NOTE: If the client has scheduled visit(s) and the Primary Phone or Primary Email are updated on the patient profile, the patient will automatically receive appointment notifications to their updated contact information. The client is able to join from the previous invitation (if accessible) or through the new one as the visit URL stays the same.



Waiting Rooms

Phone Number
+1 (250) 555-7777 Mobile
Notifications for upcoming visits might be resent due to the phone number change.

Email
bcvpatienttwo@gmail.com Home
Notifications for upcoming visits might be resent due to the email change.

Need Reason for Visit 08/22/2022 10:00
Need Reason for Visit 08/22/2022 09:50
Need Reason for Visit 08/17/2022 08:20
test 08/09/2022 13:05
Test Appointment 07/11/2022 10:00